Re-Hire Action

	PA40

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
11/1/04	Marie Dunlap	Per SIR 499, Personal Holiday quota creation upon rehire
11/14/04	Emilie Miller	Edit 1
11/16/04	Emilie Miller	Edit 2
11/30/04	Emilie Miller	Edit 3
11/30/04	Ligaya West	Payroll master data related edits
4/15/05	Kathy Henry	Fixed problems with copied steps; incorporated new standards; added notes related to UP022 & UP033
7/20/05	Kathy Henry	Added boilerplate text for messages
8/15/05	Jenelle Anderson	Inserted formatted messages boilerplate
8/11/06	Lesa Terry	Update benefits and bank details
8/15/06	Chylynn Hansel	Updates for roles
12/31/06	Janet Pasion	Added remove Separation Date from Date Specifications Infotype. (Step 42)
1/29/07	Janet Pasion	Added PAY1 information in the Helpful Hints section.

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Purpose

Use this procedure to re-hire an employee.

Trigger

Perform this procedure when an employee is to be hired into State employment and they previously worked for the State, but are not currently active.

Prerequisites

The employee has an assigned personnel number in HRMS.

Menu Path

Human Resources → Personnel Management → Administration → HR Master Data → Personnel Actions

Transaction Code

PA40

Date	Procedure Update Log
12/31/06	Step 42 added.
1/29/07	PAY1 information added in the Helpful Hints section.
5/14/07	Step 97-102 added for the Earl per RA date

Helpful Hints

- **PAY1 NOTE**: When entering the employee's eligibility effective date on the A.41 screen, use the same date that the employee was hired on in the HRMS system.

  For example: If the employee's first day is the 2nd, then the 2nd should be keyed on the A.41 screen in PAY1 when establishing insurance. Another example is that the 1st falls on Saturday and the new person starts on Monday the 3rd. You will need to key the 3rd. If the new employee's start date in PAY1 is prior to the start date in HRMS the record will reject.

- Personal Holiday quotas are only created by the system at the beginning of a year. Employees who are hired after the beginning of the year and are entitled to a Personal Holiday will need to have their quota entered manually. See OLQR procedure Quota Accrual Generate Manually to lead you through this process.

- This procedure my require hand-offs to other roles (payroll processor and /or benefits processor) depending on the structure of your agency and your role at your agency.

- It is critical if a hand-off is made to anther role, that the transaction code **PA40** is used and the "*execute into infogroup*" process is used. This is explained further in this procedure. Using **PA40** will ensure that all required infotypes are completed.

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- The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	**Example**: Make an entry in all required fields. **Action**: Fix the problem(s) and then click (Enter) to proceed.
Warning	**Example**: Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click (Enter) to proceed.
Confirmation or	**Example**: Save your entries. **Action**: Perform the required action to proceed.

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	Procedure

1. Start the transaction using the above menu path or transaction code **PA40**.

Personnel Actions

2. Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number **Example:** 2000411
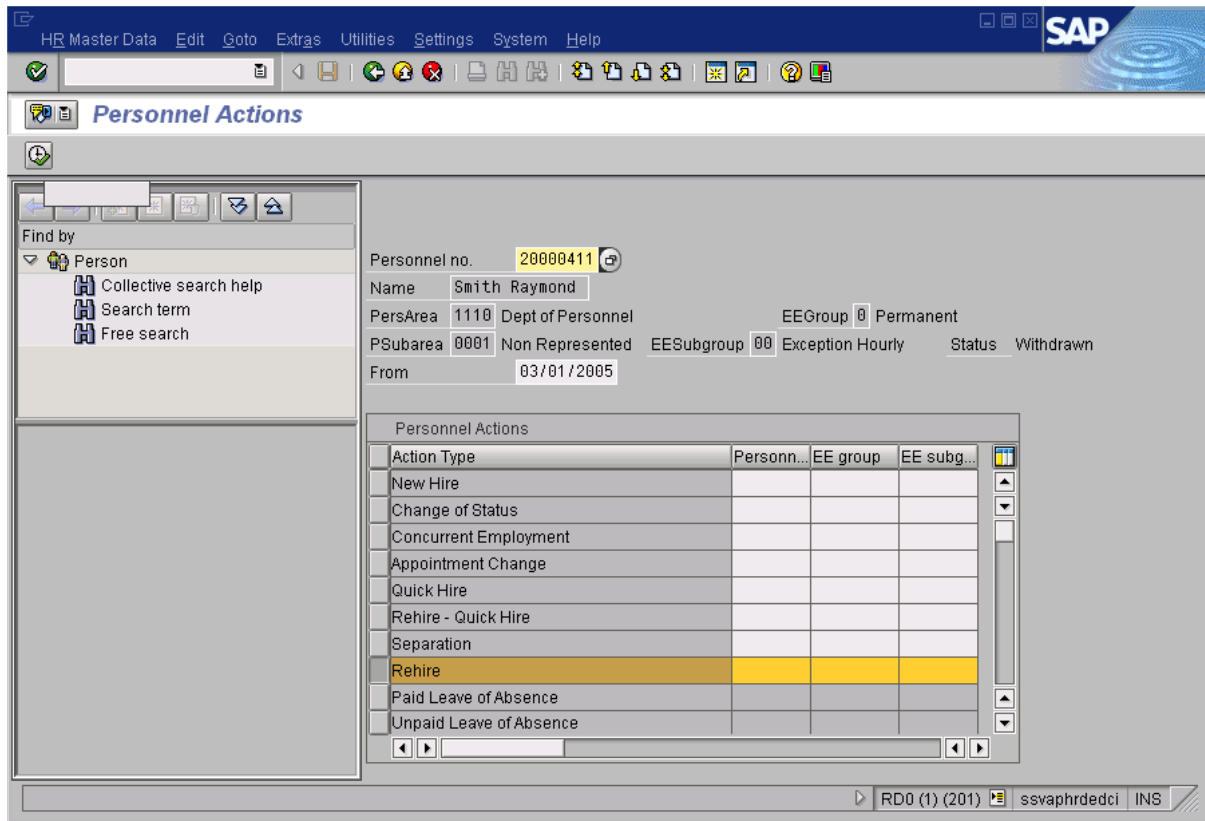
3. As required, complete/review the following fields:

If	Go To
You are the ***Personnel Administration Processor***	Step 4
You are the ***Payroll Processor***	Step 53
You are the ***Benefits Processor***	Step 76

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4.   Complete the following fields:

Field Name	R/O/C	Description
From	R	The effective of the action. ❌ Only enter the *From* date if you are the **Personnel Processor** initiating the appointment change action. **Example:** 3/1/05

Personnel Actions

5.   Click the gray box to the left of Rehire .

6.   Click ✅ (Enter) to validate the information.

7.   Click 🕑 (Execute) to execute the action.

Copy Actions (0000)

8. Complete the following fields:

Field Name	R/O/C	Description
Reason for Action	R	The reason for the rehire action. **Example:** Probationary Appointment
Position	R	The organizational position to which the employee is assigned. **Example:** 60186031

8.1 In the **Reason for Action** field, click (Matchcode) to open the selection list.

Reason for Action (1)   22 Entries Found

Reason for Action (1)   22 Entries Found

Restrictions

Action Type: U6
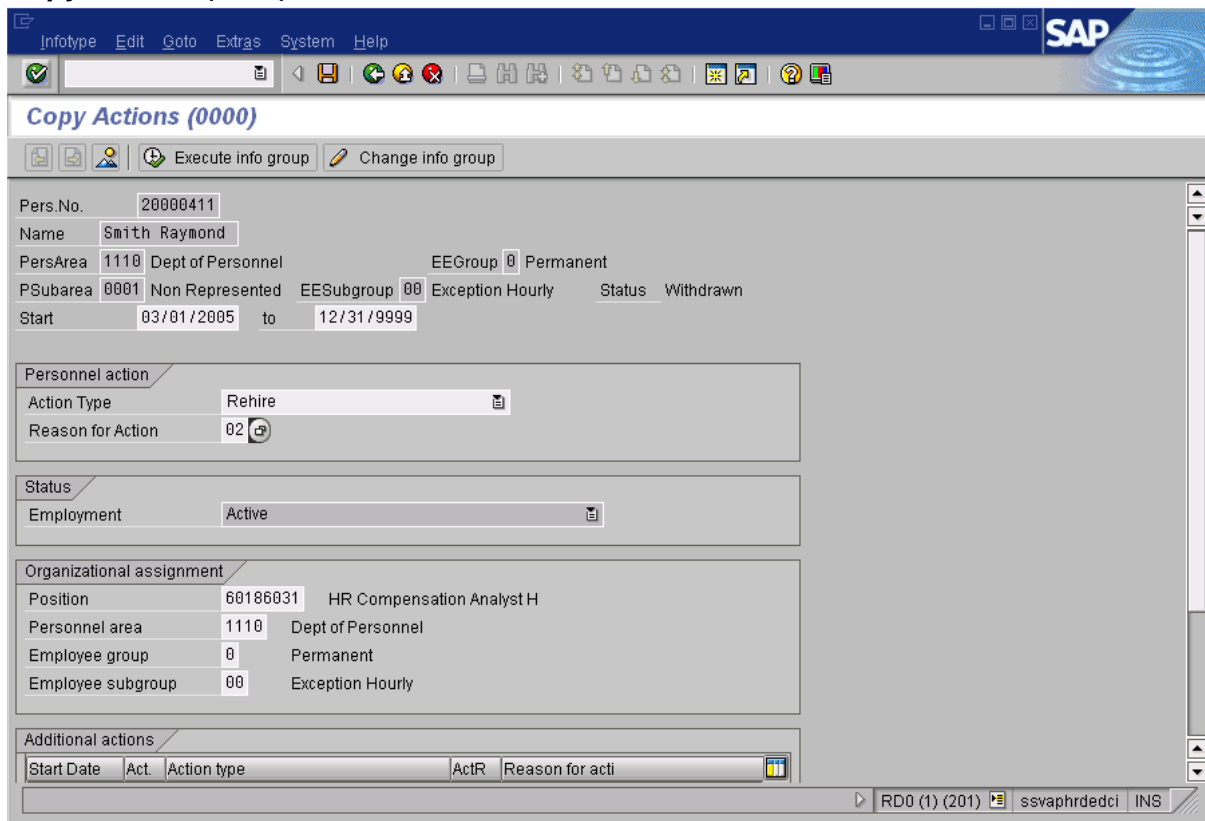Name of action type: Rehire

Ac...	Name of reason for action
01	Temporary Appointment
02	Probationary Appointment
03	WMS Acting Apptmt
04	WMS Apptmt With Review
05	WMS Apptmt Without Review
06	Apptmt of Employee Bus. Unit
07	Apptmt of Retiree - PERS 1
08	Apptmt of Retiree-PERS 2 or 3
09	Emergency Appointment
10	Exempt Appointment
11	In-Training Appointment
12	Intermittent Appointment
13	Project Appointment
14	Reapptmt. for Settlement Pay
15	Reemployment
16	Reinstatement
17	Reversion Appointment
18	RIF Appointment
19	Seasonal Appointment
20	Supported Employment Apptmt
21	Volunteer Assignment
22	Work Study Student

22 Entries Found

8.2 Click the appropriate reason for the rehire.

8.3 Click (Copy) to accept.

Copy Actions (0000)

9.   Click ![Enter icon] (Enter) to validate the information.

10.   Click ![Save icon] (Save) to save.

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Copy Personal Data

11. Make changes as required.

12. Click ![Enter] (Enter) to validate the information.

13. Click ![Save] (Save) to save.

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Copy Organizational Assignment (0001)

14. Complete the following fields:

Field Name	R/O/C	Description
Contract	R	The employee's appointment status. **Example:** Probation
Org. key	O	The pay distribution location. **Example:** 4000
Time	O	The time data administrator is responsible for the employees assigned to him or her. **Example:** DA

15. Click to validate the information.

16. Click to save.

❌ If you are rehiring an employee who did not previously work at your agency, the system may take you back to **Personnel Actions PA40** screen at this point. If it does follow steps **17-23**, if not go to step **24**.

Personnel Actions

HR Master Data Edit Goto Extras Utilities Settings System Help

Personnel Actions

Personnel no.	
From	

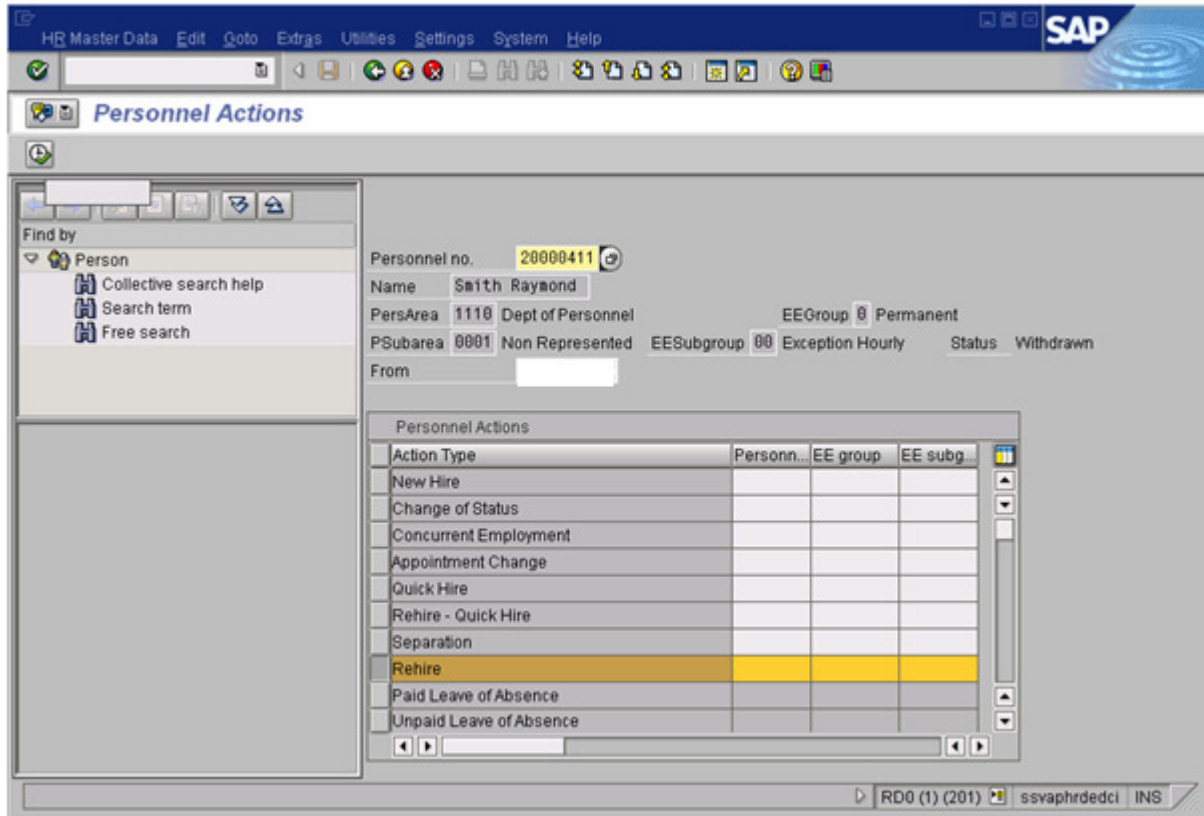| Personnel Actions			
Action Type	Personn...	EE group	EE subg...
New Hire			
Change of Status			
Concurrent Employment			
Appointment Change			
Quick Hire			
Rehire - Quick Hire			
Separation			
Rehire			
Paid Leave of Absence			
Unpaid Leave of Absence			
Return from Leave of Absence			
Group 2 to 1 New Hire/Trnsfr			
Group 2 to 1 Rehire/Transfer			
Group 1 to 2 Sep/Trnfrs			
Conversion Correction			

17.   Enter the employee's personnel number.

    Payroll Processor –Do not put a "From" date in the field prior to executing the

transaction. If you entered a "From" date click ![icon] (Back) and delete the date and then

click ![icon] (Execute).

18. Click ![icon] (Enter) to validate the information.

Personnel Actions

19. Click ![icon] (Execute) to start the transaction.

Actions (0000)

20. Click Execute info group .

21. An information pop up box will appear informing you that "This entry will delete a record." Click (Enter) to continue.

22. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click Continue .

     This infotype was already saved this infotype so it is ok to continue.

23. Click (Next Record) until you reach *Change Contract Elements* Infotype (0009).

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Change Contract Elements (0016)

24. Make changes as required.

> This screen will only appear if the contract changes or the employee has to complete another probationary period.

25. Click (Enter) to validate the information.

26. Click (Save) to save.

Create Monitoring of Tasks (0019)

ℹ️   This screen will only appear if there is a probationary period.

27. Complete the following fields:

Field Name	R/O/C	Description
Reminder Date	O	The date when you want to receive a reminder for this task. **Example:** 5/25/05
Lead/follow-up time	O	The number of days, weeks, months, or years prior to the event when you want to receive a reminder for this task.

28. Click ✅ (Enter) to validate the information.

29. Click 💾 (Save) to save.

Copy Addresses (0006)

30. Make changes as required.

31. Click (Enter) to validate the information.

32. Click (Save) to save.

Create Planned Working Time (0007)

33. Complete the following fields:

Field Name	R/O/C	Description
Work schedule rule	R	A description of the duration and composition of employee working time for any given workday. **Example:** FULL
Time Mgmt status	R	The part of the work schedule that an employee is assigned to and signifies how hours are calculated based on the employee's assigned work schedule. **Example:** 9 – Time evaluation of planned times

Field Name	R/O/C	Description
Additional time ID	C	The indicator on how employee leave will accrue Enter: ▪ 00 for full normal leave accrual (will default if to normal if field is left blank). ▪ 01 for NO leave accrual ▪ 02 for sick leave accrual only
Employment percent	O	The amount of time that an employee works per week in a particular position and is described in terms of a percentage. **Example:** 100.00

34. Click ✅ (Enter) to validate the information.

35. Click 💾 (Save) to save.

Subtypes for infotype "Education" (1)   12 Entries Found

36. Click the appropriate education level.

37. Click ✅ (Copy) to accept.

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Copy Education (0022)

38. Make changes as required.

39. Click (Enter) to validate the information.

40. Click (Save) to save.

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Copy Date Specifications (0041)

The *Prsnl Holiday/Elgblty* (Personal Holiday Eligibility) is the date an employee is eligible to take a personal holiday.

The *Prsnl Holiday/Elgblty* will default to the new hire date. If the employee is not eligible to take a personnel holiday when they start employment, you will need to change the date to when they are eligible.

In HRMS, there are a limited number of date types to enter into Date Specifications. You are limited to 12 date types for each record.

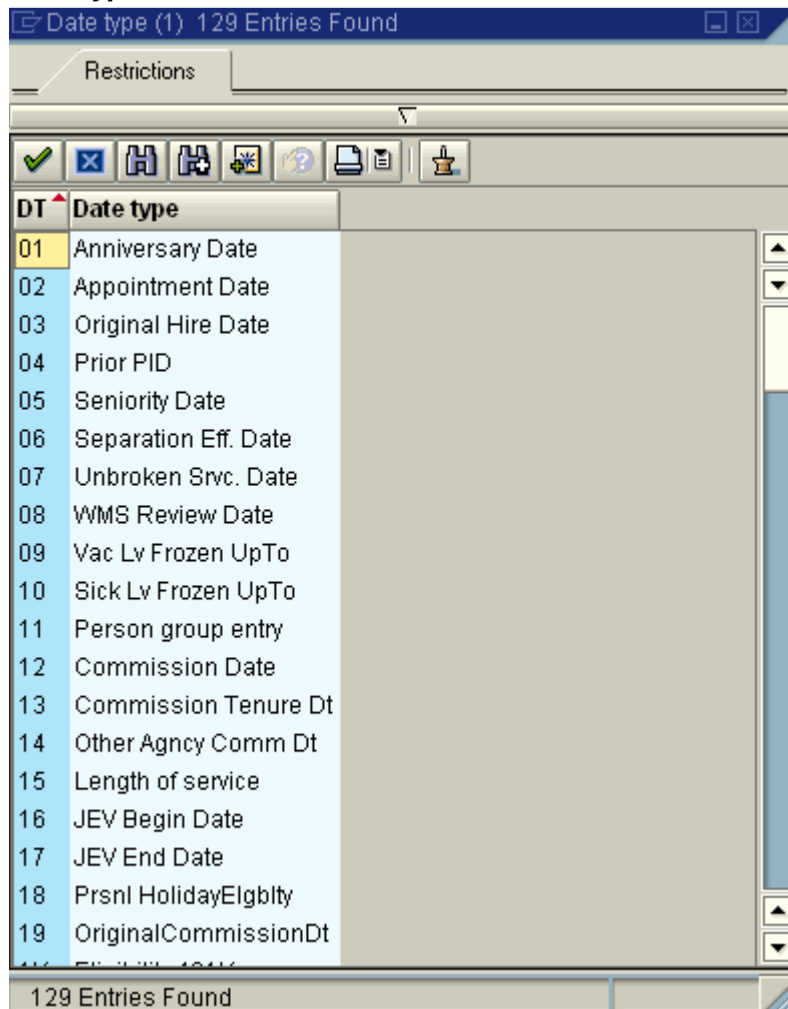**41.** Create the date type for *Vac Lv Frozen Up To.*

This is the date the employee will be eligible to take vacation leave. It is date type 09.

42. Remove the last *Separation Eff. Date* (Data Type 06).

A new date will be created when the employee has separated from the agency.

43. Click in the Date type field to select the match code.
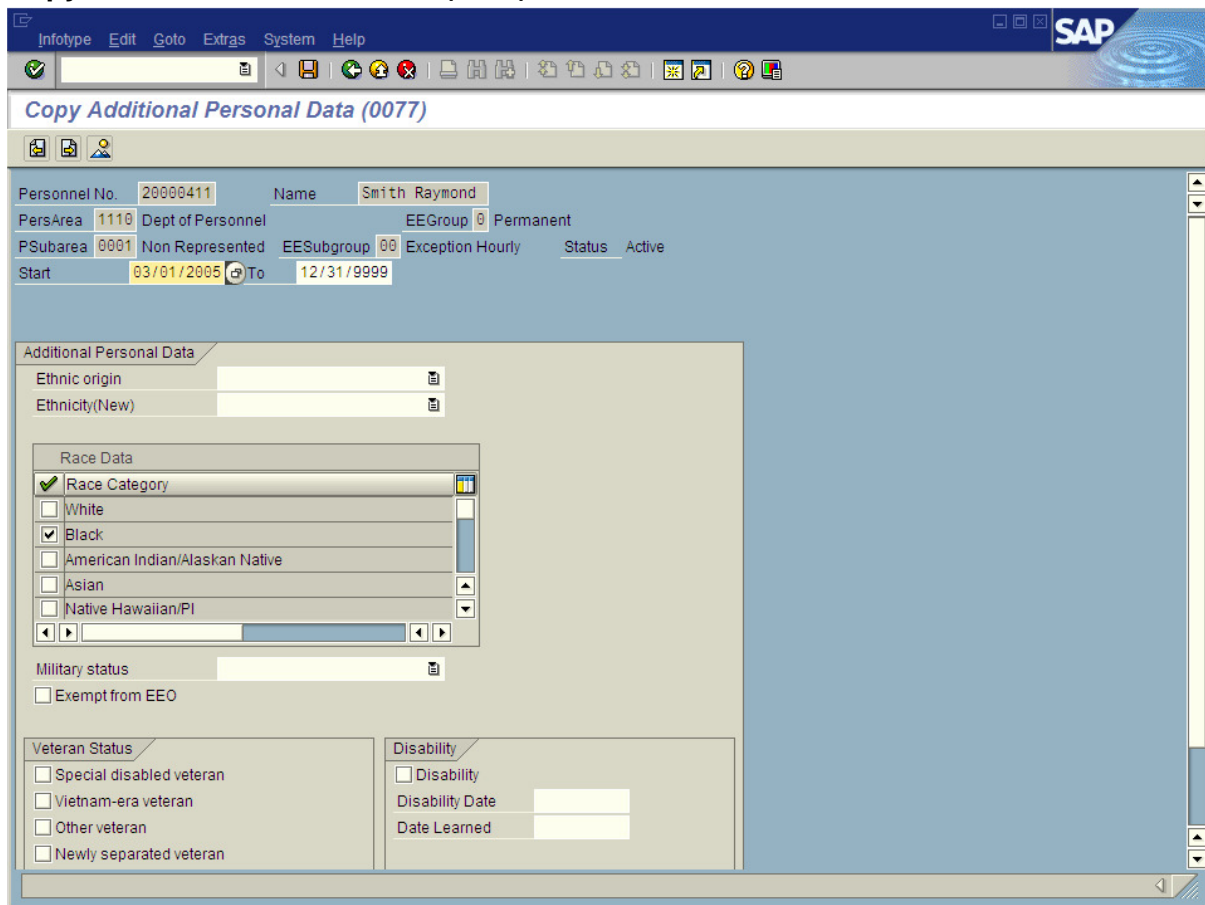
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Date type

Date type (1) 129 Entries Found

Restrictions

DT	Date type
01	Anniversary Date
02	Appointment Date
03	Original Hire Date
04	Prior PID
05	Seniority Date
06	Separation Eff. Date
07	Unbroken Srvc. Date
08	WMS Review Date
09	Vac Lv Frozen UpTo
10	Sick Lv Frozen UpTo
11	Person group entry
12	Commission Date
13	Commission Tenure Dt
14	Other Agncy Comm Dt
15	Length of service
16	JEV Begin Date
17	JEV End Date
18	Prsnl HolidayElgblty
19	OriginalCommissionDt

129 Entries Found

44. Double click 09 Vac Lv Frozen UpTo .

45. Make other changes to the Date Specifications as required, i.e, adjust the Anniversary Date.

46. Click (Enter) to validate the information.

47. Click (Save) to save.

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Copy Additional Personal Data (0077)

48. Make changes as required.

49. Click ![Enter] (Enter) to validate the information.

50. Click ![Save] (Save) to save.

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Create Basic Pay (0008)

51. Complete the following fields:

Field Name	R/O/C	Description
Reason	R	The reason for this pay record. **Example:** Initial Appointment
Next Increase	C	The date of the employee's next pay increase. If you leave the date blank, the employee will not receive a pay increase. **Example:** 01/25/05
Level	C	The pay scale level (A – K). Level A will default in. If the employee is at a higher level change it here. **Example:** A

Create Basic Pay (0008)

52. Click ![Enter icon] (Enter) to validate the information.

53. Click ![Save icon] (Save) to save.

![Warning icon] For the **Personnel Administration Processor**, this will mark the end of the New Hire action. After saving, click ![icon] to exit the action and transfer the New Hire Information Packet to the **Payroll Processor** who will complete the action.

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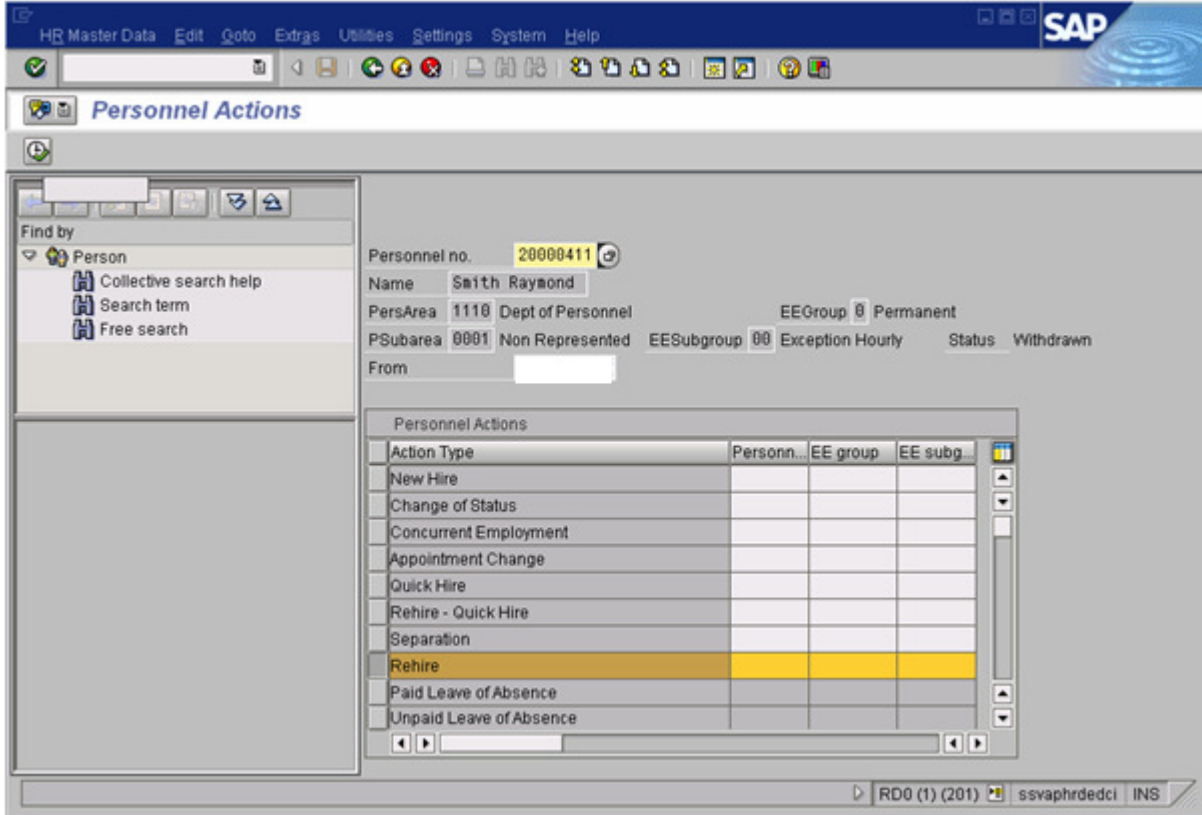**Personnel Actions**

54.   Enter the employee's personnel number.

> ***Payroll Processor*** –Do not put a "From" date in the field prior to executing the transaction. If you entered a "From" date click [icon] (Back) and delete the date and then click [icon] (Execute).

55. Click (Enter) to validate the information.

Personnel Actions

56. Click (Execute) to start the transaction.

Actions (0000)

57. Click [Execute info group] .

58. An information pop up box will appear informing you that "This entry will delete a record." Click ☑ (Enter) to continue.

59. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click [✓ Continue] .

    ℹ️   The ***Personnel Processor*** has already saved this infotype so it is ok to continue.

60. Click 🔄 (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click 🔄 (Next Record) until reach *Create Bank Details* Infotype (0009).

Create Bank Details (0009)
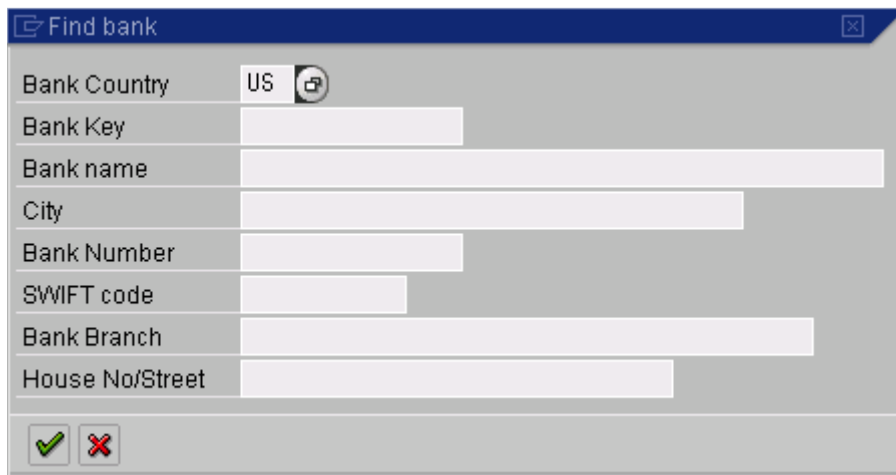
61. In the Bank Key field, click ⬚ (Matchcode) to open the Find Bank window.

Find bank

61.1   To search for a bank by name: in the **Find bank** window, in the **Bank name** field, type a portion of the bank name, followed by an asterisk (*) – for example, Washington*.

To search by city, in the **Find bank** window, in the **City** field, type an asterisk (*), a portion of the city name, followed by another asterisk (*) – for example, *Olympia*.

61.2   Click checkmark (Continue) to accept and display a list of banks matching the criteria.

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Bank Data (1) 138 Entries Found

Ct...	Bank Key	Name of bank	House number and street	City	Bank Branch	SWIFT co
US	054001699	WASHINGTONFIRST BANK	1500 K ST NW	20005 WASHINGTON		
US	061092387	WASHINGTON MUTUAL BANK, FA	6601 ROSWELL RD NE	30328 ATLANTA	ABERNATHY SQUARE	
US	064201832	WASHINGTON COUNTY BANK	3111 BROWNS MILL RD	37604 JOHNSON CITY	WAL-MART	
US	065202461	WASHINGTON STATE BANK	103 N MAIN ST	70589 WASHINGTON		
US	065204391	WASHINGTON STATE BANK	238 UNION ST	70512 ARNAUDVILLE	ARNAUDVILLE	
US	071074528	WASHINGTON MUTUAL BANK, FA	2757 PFINGSTEN RD	60025 GLENVIEW	GLENVIEW-PLAZA DEL PRADO	
US	071122276	WASHINGTON STATE BANK	CHERRY TREE CTR	61571 WASHINGTON		
US	073902216	WASHINGTON STATE BANK	303 WASHINGTON	52353 WASHINGTON	MOTOR BANK	
US	096016985	WASHINGTON COUNTY BANK, NA	990 HELENA AVE NORTH	55128 OAKDALE		
US	104901856	WASHINGTON COUNTY BANK	303 S 13TH ST	68061 TEKAMAH		
US	104913161	WASHINGTON COUNTY BANK	303 S 13TH ST	68061 TEKAMAH		
US	104914089	WASHINGTON COUNTY BANK	303 S 13TH ST	68061 TEKAMAH		
US	107089555	WASHINGTON MUTUAL BANK, FA	1600 CALIFORNIA ST STE 4	80202 DENVER	16TH STREET MALL	
US	111016938	WASHINGTON MUTUAL BANK, FA	8144 WALNUT HILL LN, STE 180	75231 DALLAS		
US	111993776	WASHINGTON MUTUAL BANK, FA	1900 PRESTON RD, STE 111	75093 PLANO	PRESTON PARK	
US	112315379	WASHINGTON MUTUAL BANK, FA	400 E MAIN ST	95296 STOCKTON		
US	113193723	WASHINGTON MUTUAL BANK, FA	201 W JACKSON ST	77437 EL CAMPO	EL CAMPO	
US	116310956	WASHINGTON MUTUAL BANK, FA	400 E MAIN ST	95296 STOCKTON		
US	122240463	WASHINGTON MUTUAL BANK	1201 3RD AVE	98101 SEATTLE		WMSBUS
US	122286935	WASHINGTON MUTUAL BANK, FA	400 E MAIN ST	95296 STOCKTON		
US	123103554	WASHINGTON TRUST BANK	218 LAKESIDE AVE	83814 COEUR D'ALENE	COEUR D'ALENE	
US	123204550	WASHINGTON MUTUAL BANK	110 HAWTHORNE AVE SE	97301 SALEM	HAWTHORNE & STATE	
US	123205070	WASHINGTON MUTUAL BANK	1201 3RD AVE	98101 SEATTLE		WMSBUS
US	123206037	WASHINGTON MUTUAL BANK	1201 3RD AVE	98101 SEATTLE		WMSBUS
US	123271978	WASHINGTON MUTUAL BANK, F.S.B.	5664 S 900 EAST, STE 6	84121 MURRAY	MURRAY-9TH STREET MARKET PLACE	
US	123900087	WASHINGTON TRUST BANK	717 W SPRAGUE AVE	99201 SPOKANE		WTBAUS
US	125008165	WASHINGTON FIRST INTL BANK	9709 3RD AVE NE	98115 SEATTLE		WFIBUS6
US	125100089	WASHINGTON TRUST BANK	12 BASIN NW	98823 EPHRATA	EPHRATA	
US	125105068	WASHINGTON TRUST BANK	717 W SPRAGUE AVE	99201 SPOKANE		
US	125108078	WASHINGTON MUTUAL BANK	11225 SE 6TH	98004 BELLEVUE	BELLEVUE	

138 Entries Found

61.1　Click the appropriate bank.

61.2　Click ☑ (Copy) to accept.

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Create Bank Details (0009)

62. Complete the following fields:

Field Name	R/O/C	Description
Bank Account Number	O	The employee's bank account number. ⓘ Leave blank for a Warrants payment method. **Example:** 325497879
Bank control key	O	The type of bank account - for example, savings or checking. ⓘ Enter *01* for Checking or *02* for Savings. Do not leave this field blank **Example:** 02
Payment method	R	The manner in which an employee is compensated, either by warrant or direct deposit. **Example:** C = Warrant; D = Bank Transfer (ACH)

62.1 In the **Payment method** field, click 🔲 (Matchcode) to open the selection list.

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Payment Method (1)   2 Entries Found

62.2 Click to select the appropriate payment method.

62.3 Click ☑ (Copy) to accept.

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Create Bank Details (0009)

63. Click 🗸 (Enter) to validate the information.

64. Click 🖫 (Save) to save.

Create Recurring Payments/Deductions (0014)

65. If there will be recurring deductions, complete the following fields:

Field Name	R/O/C	Description
Start	R	The start date for the payment/deduction.
Wage type	R	The type of payment or deduction.
Amount	R	The amount of the payment/deduction.
Payment model	R	The payment schedule for the payment/deduction – the pay period and the amount. **Example:** Every Pay Period – Half Amount

66. Click (Enter) to validate the information.

67. Click (Save) to save.

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Create Withholding Info W4/W5 US (0210)

68. In the **Filing Status** field, click [icon] (Matchcode) to open the selection list.

Filing status (1)   3 Entries Found

F	Long Text	Start Date	End Date
01	Single	01/01/1980	12/31/9999
02	Married	01/01/1980	12/31/9999
06	Head of household or family	01/01/1980	12/31/9999

Tax Authority: FED

3 Entries Found

69. Click the appropriate filing status.

70. Click ☑ (Copy) to accept.

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Create Withholding Info W4/W5 US (0210)

71. Complete the following field:

Field Name	R/O/C	Description
Allowances	O	The number of allowances the employee is claiming. **Example:** 2

72. Click ![Enter icon] (Enter) to validate the information.

73. Click ![Save icon] (Save) to save.

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Create Add. Withh. Info. US (0234)

74. Complete the following fields:

Field Name	R/O/C	Description
Empl. override group	R	This is the Worker's Compensation code that an employee holds for a particular job. **Example:** 0034

75. Click ✅ (Enter) to validate the information.

76. Click 💾 (Save) to save.

⚠️ For the ***Payroll Processor***, this will mark the end of the New Hire action. After saving, click

🏠 to exit the action and transfer the New Hire Information Packet to the ***Benefits Processor*** who will complete the action.

Personnel Actions

77. Enter the employee's personnel number.

> ***Benefits Processor*** –Do not put a "From" date in the field prior to executing the transaction. If you entered a "From" date click (Back) and delete the date and then click (Execute).

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78. Click (Enter) to validate the information.

Personnel Actions

79. Click (Execute) to start the transaction.

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Actions (0000)

80. Click .

81. An information pop up box will appear informing you that "This entry will delete a record." Click (Enter) to continue.

82. An Execute info group pop up box will appear informing you that "Warning: Personnel action infotype not saved with 'execute info group' function! Click .

    ![info icon] The **Personnel Processor** has already saved this infotype so it is ok to continue.

83. Click (Next Record) until you reach Subtypes for Infotype Education click the **X** in the right hand corner of the box to by-pass this infotype. Continue to click (Next Record) until reach *Create General Benefits Information* Infotype (0171).

Create General Benefits Information (0171)

84. Make changes as required.

ⓘ The **1ˢᵗ Program Grouping** defaults in as eligible. To verify that the position is eligible use transaction code **PO13D**, click the gray box to the left of *Acct Assignment Features* infotype. If there is an X in the box next to retirement eligible then the position is retirement eligible. If the box is blank the position is not retirement eligible.

The value in the **2ⁿᵈ Program Grouping** field defaults from appointment information in the *Organizational Assignment* infotype (0001).

You will have to change the **2ⁿᵈ Program Grouping** field if:
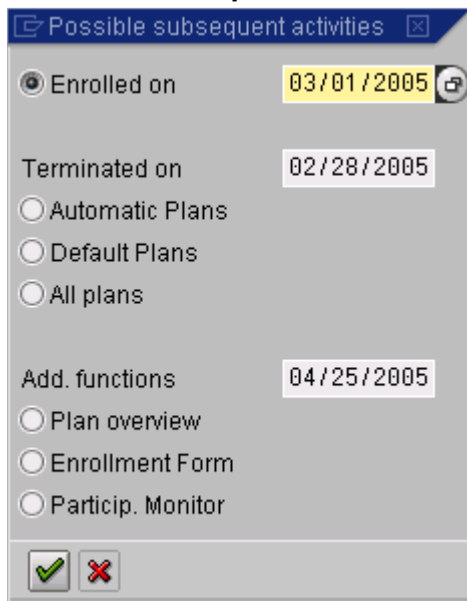
• An employee chooses a different plan.

• The Employee Type defaults to a code not consistent with the System/Plan set up at hiring time.

• An employee changes positions and wants to continue contributing to the System/Plan from his previous position rather than the one that defaults with the new position.

For a list of valid type codes for each retirement system, see The Employer Handbook - Type Codes.

85. Click 🗸 (Enter) to validate the information.

86. Click 🖫 (Save) to save.

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Possible subsequent activities

87. Click ✅ (Copy) to accept.

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Enrollment

88. Click [Get offer] .

Enrollment

89. Click the appropriate Savings Plan.

By using the **PA40** transaction code, HRMS will identify all plans that the employee is eligible to participate in.

For a new PERS 2 employee, upon completion of the enrollment processor, immediately update the Plan choice code on the *Savings Plan* (0169) infotype to place the employee on the 70-day/90-day default report. See OLQR procedure, Retirement Plan Choice Code 90 day period (New Hire).

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Maintain Savings Plan

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90. Complete the following fields:

Field Name	R/O/C	Description
Percentage	R	This is a field used to store a percentage amount for the retirement deduction. **Do not leave the percentage field bank or HRMS will not take any deductions for retirement.** If you do not know the correct plan contribution percentage, HRMS can prompt you. Click in the percentage field and enter any number (example: 2) and press the enter button on your keyboard. You will receive an Error message in the status bar telling you what the correct contribution percentage is for the selected plan. **Example:** 2.25

91. Click Accept .

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Enrollment

92. Click [⊕ Enroll] .

Confirmation of Selected Actions

93. Click [⏱ Enroll].

Enrollment
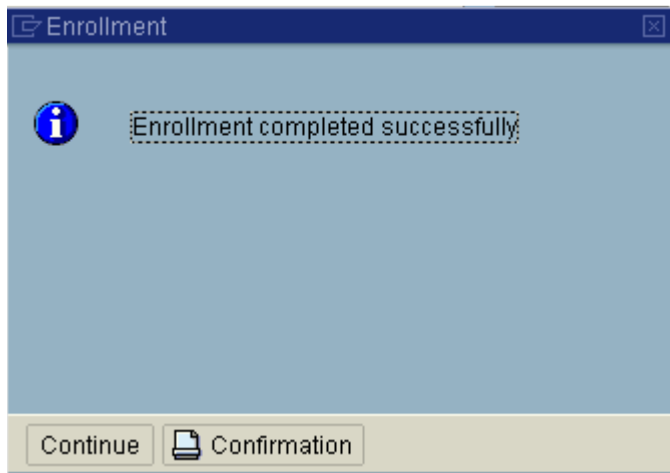
94. Click [Continue] to continue or click [Confirmation] to print confirmation.

Possible subsequent activities
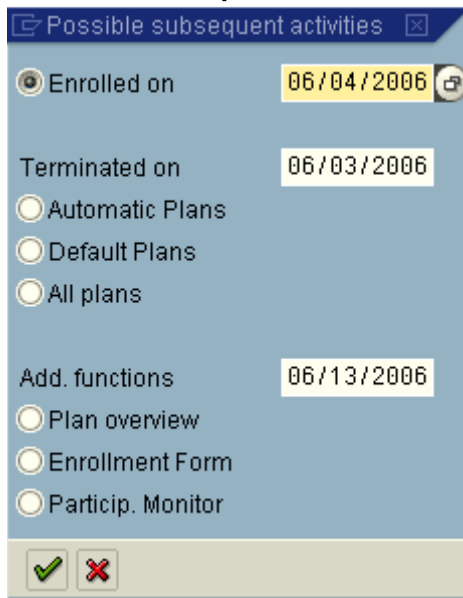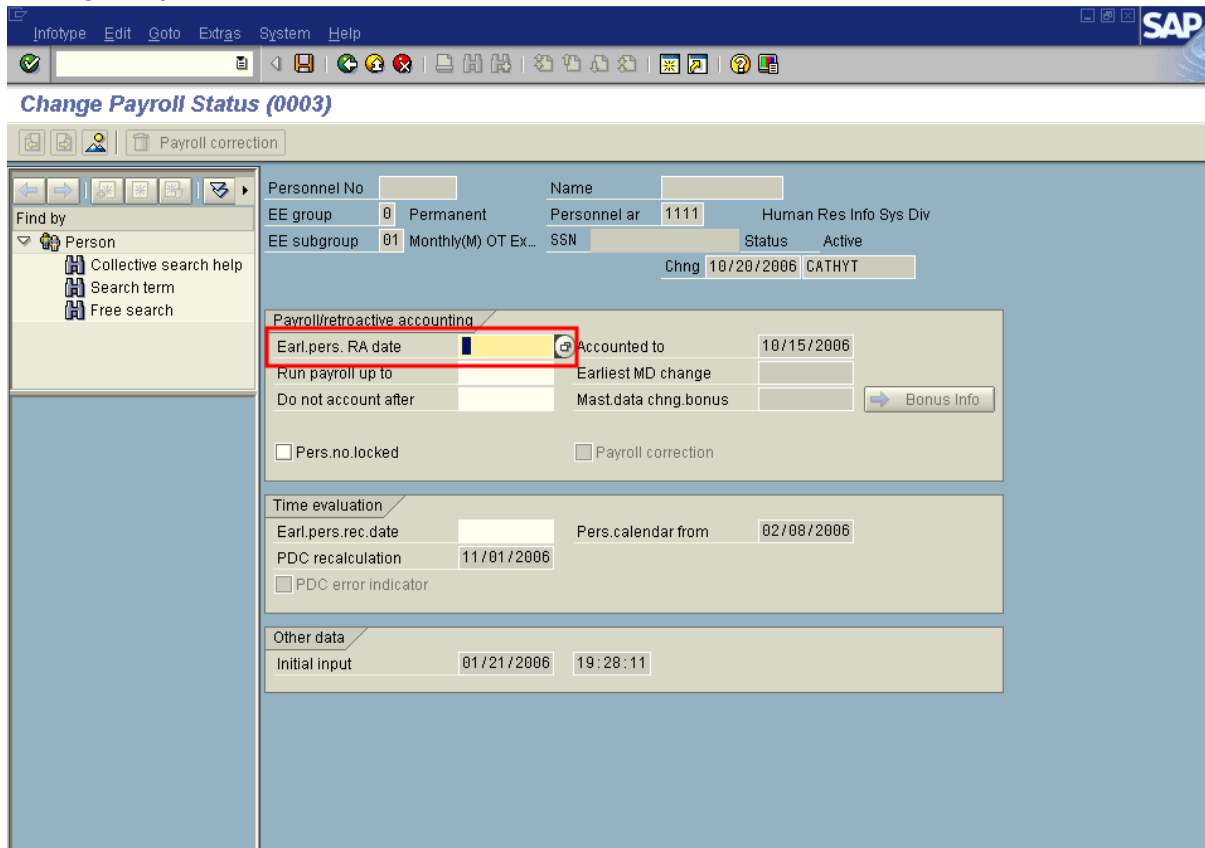
95. Click [X] to cancel.

96. Click [↩] to return to the previous screen. The following screen displays:

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When the Re-hire action is complete, the ***Payroll Processor*** will need to update ***Payroll Status (0003)***. In order to prevent HRMS from performing any retro calculations into the inactive period for the employee, the ***Earl per RA date*** needs to be updated to the first day of the pay period of the new hire.

97. Enter /nPA30 in the command field

98. Click the gray box to the left of [Payroll Status ✔] to select.

99. Click [✎] (Change) to change the record.

Change Payroll Status (0003)

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100. Complete the following fields:

Field Name	R/O/C	Description
Earl. Pers. RA Date	R	Earliest Personnel Retro Active Date: Defines the date in the payroll past up to which master and time data changes are allowed as well as the date up to which the system carries out retroactive accounting ⓘ This date needs to be the first day of the pay period. **Example:** An employee is hired on 3/10/2006, the date for the Earl. Pers. RA is 3/1/2006

101. Click ✅ (Enter) to validate the information.

102. Click 💾 (Save) to save.

103. You have completed this transaction.

Result

You have rehired an employee.

ⓘ If the employee is entitled to a personal holiday and has not used it this year, create a Personal Holiday quota type.

Result

You have rehired an employee.

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